



# **Personnel Administration**

## **Chapter 3**

### **Maintain Employee Data**



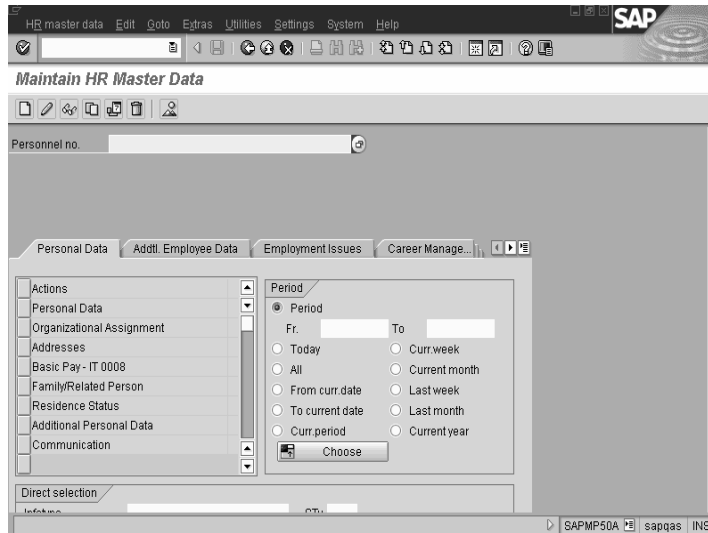
## **Maintain Employee Data Objectives**

By the end of this chapter, you will be able to:

- Define terms, concepts, and procedures
- Maintain and display employee master data record
- Correct employee master data errors



## Maintaining Employee Master Data



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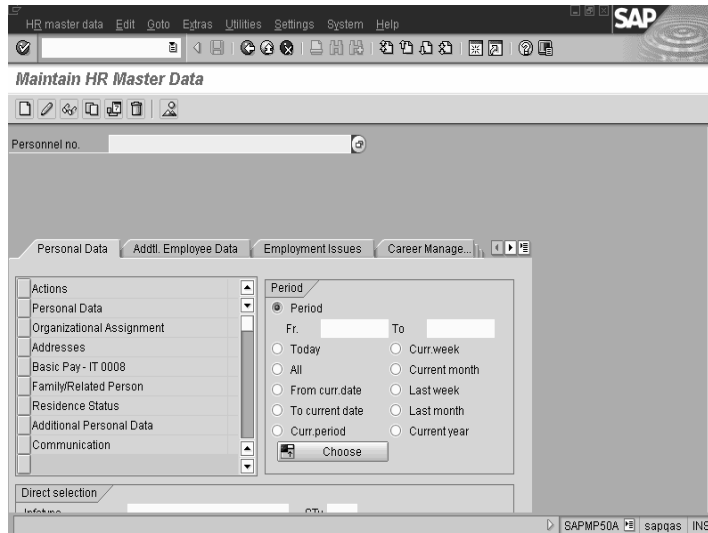
## Maintaining Employee Master Data

Throughout the lifecycle of an employee at the State of Arkansas, there are many situations that require adjustments and modifications to employee personnel records. This may include a change in address, bank details, taxes, and so on.

There are two methods for maintaining employee data in AASIS:

- **Personnel Actions (PA40)** – used to complete more complex changes such as a change in pay or transfer. Infotypes are maintained sequentially within the personnel actions. This ensures that all data relevant to particular personnel procedures are recorded and all records are properly delimited in the system.

## Maintaining Employee Master Data



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**Maintaining Employee Master Data** - There are two methods for maintaining employee data, continued:

- **Maintain Master Data (PA30)** - To maintain specific employee records outside of an action, you can access individual infotypes from the Maintain Master Data screen. If the appropriate Personnel Action does not exist, maintain master data by adjusting or modifying data through infotypes found in transaction PA30. However, it is not recommended to maintain the Basic Pay infotype 0008 thru PA30.

Note: PA20 displays the same information that is “maintained” in PA30, but PA20 is a “Display Only” transaction and is to be used when you need to view an employee’s information.



# Maintaining Employee Master Data

HR master data   Edit   Goto   Entries   Utilities   Settings   System   Help

**Maintain HR Master Data**

Personnel no. 3500  
Name Turner, Quartez  
EE group 1 Regular State Pers. area FA01 DFA  
EE subgroup UE Employee Cost Center 383250 Dept. of Mystery

Personal Data   Addtl. Employee Data   Employment Issues   Career Manage...

Infotype test  
Actions  
Personal Data  
Organizational Assignment  
Addresses  
Basic Pay  
Family Member/Dependents  
Residence Status  
Additional Personal Data  
Communication

Period  
Period  
Fr. To  
Today Curr. week  
All Curr. month  
From curr. date Last week  
To curr. date Last month  
Curr. period Current Year  
Choose

Direct selection  
Infotype STy

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**Individual Infotype Maintenance (PA30)** – used to locate individual infotypes or to make the appropriate changes to an infotype. This transaction can be used:

- To correct errors made during initial master data entry.
- To populate infotypes that were skipped during initial master data entry.
- To add additional data.



## Maintain Data

**The effective date must not be earlier than the beginning the first pay period of the fiscal year.**

For example, a correction initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If it is necessary for the agency to have Master Data corrected beyond the beginning of fiscal year limit, the agency must send a request with justification to the State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.

**Stop! Think! Remember!**

**Note:** The effective date must not be earlier than the beginning the first pay period of the fiscal year. For example, a correction initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If it is necessary for the agency to have Master Data corrected beyond the beginning of fiscal year limit, the agency must send a request with justification to the State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



## Maintain Data, continued

It is always a good practice to have your agency's person with the role of Agency Payroll Systems Management to run a payroll simulation after making master data updates. This will help ensure that the updates were made correctly. If the master data updates were not processed correctly, the employee's pay may be affected and/or an error message may be received.

**Stop! Think! Remember!**

**FYI:** Master Data updates performed on the Monday morning of pay week (or the morning of the day OPM/State Payroll Systems runs payroll), **MUST** be completed before 12 o'clock noon.



## Deletion of Records

If you receive a deletion message, re-check your entries. Continuing to process an entry for which a deletion warning has been generated can lead to the deletion of related information that should not be deleted.

### Stop! Think! Remember!

Agencies can delete an Action but **never** a personnel number.  
**Only OPM/State Payroll Systems has the authority to delete a personnel number.**  
**All infotypes created under that Action must be deleted also.**  
**Use extreme caution when deleting a personnel action.**



## Personnel Infotypes - Tabs

Personal Data Addtl. Employee Data Employment Issues Career Manage...

Actions ☒ Personal Data ☒ Organizational Assignment ☒ Addresses ☒ Basic Pay - IT 0008 ☒ Family/Related Person ☒

Infotype tab/button

Period

Fr. To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Curr.period ☐ Current year

Choose

Direct selection

Infotype STy

Infotype field:  
Enter the infotype # or key word

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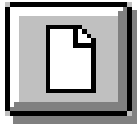
## Tabs

*Tabs* enable you to display, and jump between multiple screens of data within a single window. The green checks indicate that these records have existed or currently exist for this employee.

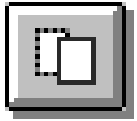
You can access a particular infotype (or subtype) either by selecting the infotype listed on the tab, or by entering the infotype number in the **Infotype** field.

To access a particular infotype for an employee based on a particular key word, enter the key word in the **Infotype** field located on the Maintain HR Master Data screen. The system will provide you with a list of all the related infotype(s) with that particular word.

## Maintaining Infotype - Buttons



- Create a new infotype record



- Copy a new infotype by copying an existing record



- Change an existing infotype record

Maintaining employee data involves either making changes to existing records or creating new records.

### Create

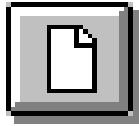
The *Create* function enables you to enter new data. You should only use this function if an infotype has not been created in the Action such as Other/Previous employers. The infotype history is created using the appropriate validity periods. Use sparingly. **To reduce errors, consider using the copy function instead.**

### Copy

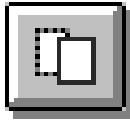
The *Copy* function also enables you to create new infotype records. It also updates the infotype history.



## Maintaining Infotype - Buttons, continue



- Create a new infotype record



- Copy a new infotype by copying an existing record



- Change an existing infotype record

However, unlike the create function, the current data is defaulted on the screen. You are then able to edit the existing data by entering a different 'Start' date and save as a new infotype record. The old record is also delimited.

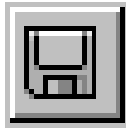
### Change

The *Change* function enables you to correct an existing record without creating a new infotype record. This function should be used only to edit incorrect data versus updating data. Changes to infotype records are not included in the history.

Note: If you use "change", the history will not be created. The existing record is just overwritten. **Use change with caution.**



## Editing Infotype Data - Buttons



• Save



• Overview

### **Save**

Click this button to save all changes or a newly created infotype record. Re-check your entries to make sure all data is correct before using this button.

### **Overview**

Click this button to display an overview of all the records of the specific infotype.



## Why Maintain Personnel Master Data through Personnel Actions (PA40)?

- If an action exists which includes the infotypes you need to correct or maintain, you may re-execute the personnel action, with transaction PA40.
- Since this is an integrated system, when you use the appropriate Personnel Action the system will prompt you to update all data for the infotypes included in the action.

When you use PA40, history is created in the actions overview.

If you exit out of PA40 before completing the action, or if your system locks up, or a power failure is experienced; re-execute your Action instead of maintaining each infotype through PA30. This procedure will automatically take you through the infotypes. To re-execute your Action, refer to **Troubleshooting Note # 7.**



## How to delete a Personnel Action

- ❖ You can delete a personnel action if the wrong employee was used or you processed the action incorrectly and want to start over.

### You cannot delete the Hire Action!

- ❖ Follow the steps below to determine which infotypes were used in the action.
  1. Enter **PA40** in the command field and press enter.
  2. Enter the personnel number used.
  3. Enter the effective date used.
  4. Select the action.
  5. Click execute.
  6. Click on the "Execute info group" button. Enter and Save.
  7. Click continue.
  8. Write down all the infotypes used in the personnel action, starting with Actions infotype 0000. Use the forward arrow to view and write down all infotypes.

**These steps are use to properly delete an action and to avoid errors in payroll.**



## How to delete a Personnel Action, continued...

1. Enter **PA30** in the command field and press enter.
2. Select the infotype to be deleted, starting with the Actions infotype 0000.
3. Click on the overview icon.
4. Select the action line item to be deleted.
5. Click on the delete icon.
6. The Delete Actions screen will be displayed. Click on the delete icon twice.

**Repeat steps 8 thru 12 for each infotype involved in the Personnel action.**

**These steps are use to properly delete an action and to avoid errors in payroll.**

**Stop! Think! Remember!**

## List Actions

[illegible]

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## List Actions

[illegible]

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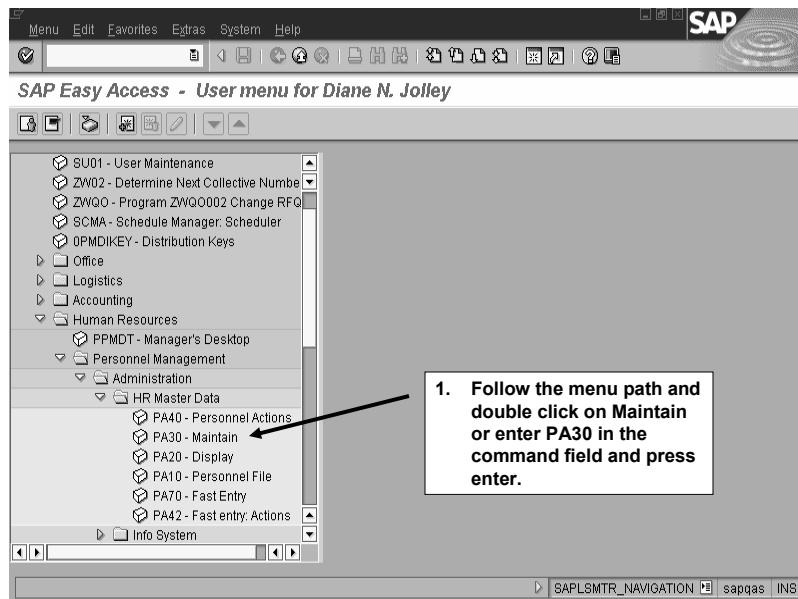


# Demonstration

## Maintain Address

Human Resources > Personnel Management >  
Administration > HR Master Data> Maintain (PA30)







HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Ma**

4. Click the change icon (pencil)

2. Enter personnel #

Personnel no. 1498  
Name Turner, Quartez  
EE group 7 State Extra/Sea... Pers.area FA01  
EE subgroup U0 Hourly Cost Center 383260 DFA

Personal Data Addtl. Employee Data Employment Issues Career Manage...

Infotype text E...  
Actions  
Personal Data  
Organizational Assignment  
Addresses  
Basic Pay  
Family Member/Dependents  
Residence Status  
Additional Personal Data  
Communication

Period  
To current date Last month  
Curr.period Current Year  
Choose

3. Select the address infotype or enter the infotype number ( 0006) in the infotype field under "Direct Selection". You may select the subtype from the drop down list.

Direct selection  
Infotype STy

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Infotype Edit Goto Extras System Help
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### Change Addresses

7. enter
8. save

Personnel No	1498	Name	Turner	Status	Active
EE group	7	State Extra/Seaso	Personnel ar	FA01	DFA
EE subgroup	U0	Hourly	SSN	432-54-1441	
Start	09/20/2004	to	12/31/9999		

#### Address

Address type: Permanent residence

Address line 1: 9121 Sulpha Springs

Address line 2:

City: Little Rock

State/Zip Code: AR Arkansas 72204

Country Key: USA

Telephone number:

#### Communications

Type	Number	Exte
Type	Number	Exte
Type	Number	Exte
Type	Number	Exte

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**Note:** If the information has been incorrect from the employee's hire date, then use the hire date. If making an update, such as the employee moves, then use the copy function and enter the beginning of the current pay period.

The effective date must not be earlier than the beginning of the first pay period of the fiscal year. For example, a correction initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If the effective date for the address correction will extend beyond the beginning of the first pay period of the fiscal year limit, the agency must send a request with justification to the State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



## Exercise Scenario #2

Someone accidentally recorded the wrong street number for an employee's address. Change the employee's address.



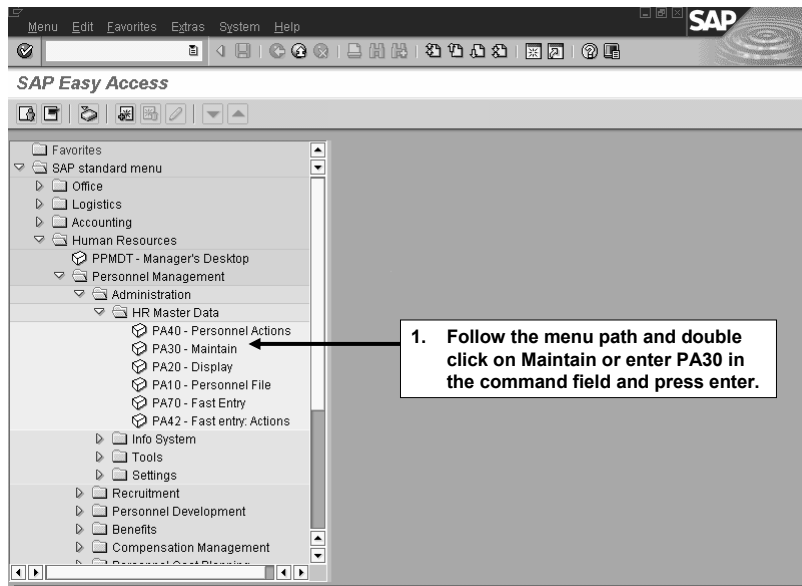


# Demonstration

## Maintain Bank Details – Create Direct Deposit

Human Resources > Personnel Management >  
Administration > HR Master Data > Maintain (PA30)









The screenshot shows the SAP HR Master Data maintenance interface. At the top is a menu bar with 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title is 'Maintain HR Master Data'. Below this is a toolbar with icons for creating, editing, deleting, and other functions. The 'Personnel no.' field is at the top left. Below it are tabs for 'Employment Issues', 'Career Management', 'Benefits', 'Payroll', and 'Taxes'. The 'Payroll' tab is selected. On the left is a list of infotypes: 'Infotype text', 'Basic Pay', 'Recurring Payments/Deductions', 'Additional Payments', 'Cost Distribution', 'Bank Details', 'External Bank Transfers', 'Payroll Status', 'Payroll Results', and 'Hourly Rate per Assignment'. The 'Bank Details' infotype is selected. On the right, there is a 'Period' section with radio buttons for 'To current date', 'Last month', 'Curr.period', and 'Current Year', and a 'Choose' button. Below this is a 'Direct selection' section with an 'Infotype' field and an 'STy' field. At the bottom left, there is a checkbox labeled 'Enter a personnel number'.

**4. Click on the copy icon.**

**2. Enter personnel number.**

**3. From the Payroll tab select the Bank Details infotype or enter the infotype number 0009 in the infotype field under Direct selection.**



SAP

Infotype Edit Goto Extras System Help

**Copy Bank Details**

Personnel No 1498 Name Turner Status Active  
EE group 7 State Extra/Seaso Personnel ar FA01 DFA  
EE subgroup U0 Hourly SSN 432-54-1441  
Start 9/20/2004 12/31/9999

Bank details

Bank Details Type Main bank

Payee Turner Quartez

Postal code / city 72204 Little Rock

Bank country USA

Bank Key 051403915 Checkbouncers Bank of Arkansas

Bank Account Number 123456789

Payment method 0 ACH Payment for Pay

Purpose

Payment currency USD

5. Enter the beginning of the current pay period.  
Refer to note below.

6. Enter the bank key number. If the  
number is unknown, click on the  
drop-down list and go to the next step.

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Note: The effective date entered in the 'Start' field, **MUST** be the beginning of the current pay period.

If you are adding a credit union or a second bank, you **MUST** select 'Other bank' from the drop-down list in the 'Bank details type' field.



**Copy Bank Details**

Personnel No: 1498    Name: Turner    Status: Active

EE group: 7    State Extra/Seasonal: FA01    DFA

EE subgroup: Find bank

Start: Bank country: US

Bank details: Bank Key:    Bank name: chec\*    City:    Bank number:    Postal code / c:    SWIFT code:    Bank Branch:    House No/Street:    Bank Account:    Payment method: ☒ ☐    Purpose:    Payment currency:    **7. Click Continue.**

**Note:** If you know the name of the bank, you may search for that bank name only. Enter one or more letters of the bank name followed by an asterisk in the 'Bank name' field. Then complete steps 7 thru 15.

Or you may search for the bank in a particular city, by entering the name of the city in the 'City' field. Then complete steps 7 thru 15.



Bank Data (1) 25 Entries Found

Restrictions

8. Select bank.

Ct...	Bank Key	Name of bank	House number and stre...	City	Bank Bran...	SWIFT code	Bank numb...
US	011201526	Mighty Money Bank of Arkansas	88 Megabucks Dr.	Little Rock			011201526
US	051403915	Checkbouncers Bank of Arkansas	2721 Highrollers Lane	Little Rock			051403915
US	053201801	Filthy Lucre National Bank	2535 Sawbucks Ave.	Little Rock			053201801
US	053202318	Loot Keepers Bank of Arkansas	95 Treasure Trail	Little Rock			053202318
US	064003205	Parsimonial Bank and Trust	22 Ti	rock			064003205
US	064102818	Cash Keepers Bank of Arkansas	25 Pl	rock			064102818
US	064103367	Fistfullo Dollars Bank and Trust Co.	25 Eastwood Lane	Little Rock			064103367
US	081509290	Ragstoriches Bank of Arkansas	888 Money penny Ave.	Little Rock			081509290
US	081518375	Finders Keepers Bank of Arkansas	2 Losersweepers Lane	Little Rock			081518375
US	082007791	Casherino Bank of Arkansas	77 Casherino Circle	Little Rock			082007791
US	082901020	Dollarama Bank of Arkansas	65 Dollar Sign Drive	Little Rock			082901020
US	082901075	Dollars Galore Bank and Trust Co.	12 Dollarway Place	Little Rock			082901075
US	082901266	Plenty Peso Bank of Arkansas	89 Bigbuck Rd.	Little Rock			082901266
US	082901774	Lottsalira Bank of Arkansas	56 Moneybags Dr.	Little Rock			082901774
US	082974332	Moneybags National Bank	87 Lincoln Ave.	Little Rock			082974332
US	084101514	Big Buck Bank	76 Sweetcash Dr.	Little Rock			084101514
US	111101908	Money Lovers Bank	8995 Greedy Lane	Little Rock			111101908
US	113117411	Hawg Bank of Fayetteville	33 Razorback Road	Fayetteville			113117411
US	253272070	Nouveau Riche Bank of Arkansas	55 Beverly Hillbillies Ave.	Little Rock			253272070
US	281573042	Dollar Dealers Bank	68 Wooden Nickels Dr.	Little Rock			281573042
US	281573288	Insider Trading Investment and Banking Co.	5588 Shady Lane	Little Rock			281573288

25 Entries Found

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Act 1887 requires all new state employees to be paid by electronic direct deposit (infotype 0009). Therefore, **Bank Details Payment Method** now defaults to **D** (direct deposit). The former default value was **P** (warrant for payroll).

Other required fields for direct deposit are **Bank Key**, **Bank Account Number**, and **Bank Control Key** ('01' Checking, '02' Savings).

Note: You MUST enter the correct bank account number and the type of account, either checking or savings. Otherwise, the employee's pay will not be transferred appropriately. VERIFICATION is a MUST for the Bank Details infotype.



SAP

Infotype Edit Goto Extras System Help

**Comp Bank Details**

**12. enter**

**13. save**

Personnel No	1498	Name	Turner	Status	Active
EE group	7	State Extra/Seaso...	Personnel ar	FA01	DFA
EE subgroup	U08	Hourly	SSN	432,54,1444	
Start	9/28/2004	to	12/31/999		

Payment method (1) 3 Entries Found

Restrictions

Bank details

Bank Details Type	Main bank
Payee	Turner Quartez
Postal code / city	72204 Little Rock
Bank country	USA
Bank Key	051403915
Bank Account Number	123456789
Payment method	D ACH Payment for P
Purpose	
Payment currency	USD

**11. Select 'D' for direct deposit.  
The value will default into the  
'Payment method' field. Enter and save.**

PM Text

- ✓ Cash Payment
- D ACH Payment for Payroll
- P Warrant for Payroll

3 Entries Found



Infotype Edit Goto Extras System Help

**Copy Bank Details**

**14. save**

Personnel No	1498	Name	Turner	Status	Active
EE group	7	State Extra/Seaso...	Personnel ar	FA81	DFA
EE subgroup	U8	Hourly	SSN	432-54-1441	
Start	09/14/2004	End	12/31/9999		

**Bank details**

Bank Details Type	Main bank		
Payee	Turner Quartez		
Postal code / city	72204 Little Rock		
Bank country	USA		
Bank Key	253272070 Nouveau Riche Bank of Arkansas		
Bank Account Number	123456789	Bank control key	02
Payment method	0 ACH Payment for Payroll		
Purpose			
Payment currency	USD		

**You will receive the message stating record delimited.**

Record valid from 09/20/2004 to 12/31/9999 delimited at end



HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 1498  
Name Turner, Quantez  
EE group 7 State Extra/Sea... Pers.area FA01 DFA  
EE subgroup U0 Hourly Cost Center 383260 DFA

Employment Issues Career Management Benefits Payroll Taxes

Infotype text E...  
Basic Pay ☒  
Recurring Payments/Deductions ☒  
Additional Payments ☒  
Cost Distribution ☒  
Bank Details ☒  
External Bank Transfers ☒  
Payroll Status ☒  
Payroll Results ☒  
Hourly Rate per Assignment ☒

Period  
Fr. To  
☐ Today ☐ Curr.week  
☐ All ☐ Current month  
☐ From curr. date ☐ Last week  
☐ To current date ☐ Last month  
☐ Curr.period ☐ Current Year  
Choose

Direct selection  
Infotype Bank Details STw

Record created

**15. Click overview, to view the employee's bank details history.**

**You will receive a message record created.**



[illegible]

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Note: The start date and end date will be reflected for each payment method.

To stop an employee's direct deposit, refer to the Table of Contents to locate the **Demonstration for Bank Details (Phase 2) – Delimit Direct Deposit**.

Remember one Bank Details Infotype must exist at all times, even after an employee has been terminated.



## Exercise Scenario #3

An employee has requested that their payroll warrant be changed to direct deposit. The employee has also opened an additional bank account in which \$50.00 will be direct deposited each pay period. Maintain the employee's bank details record to reflect the changes.



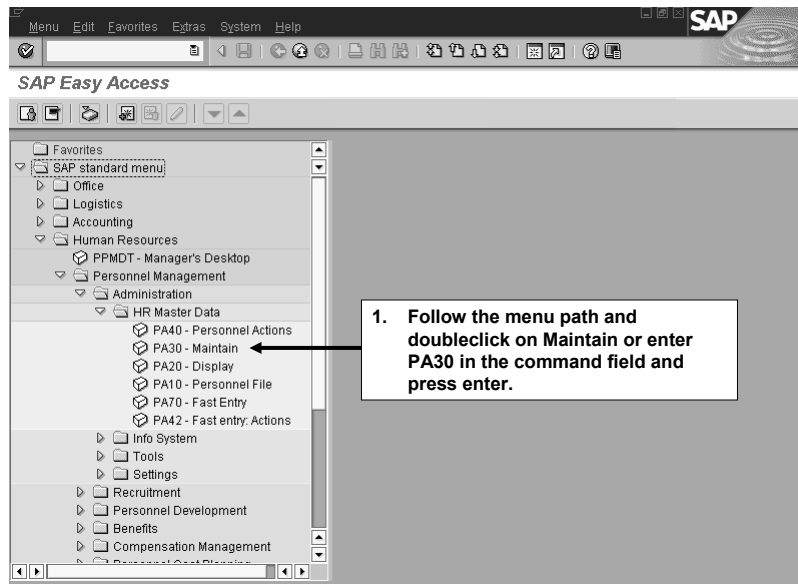


# Demonstration

## Maintain Communication – Create Communication Type

Human Resources > Personnel Management >  
Administration > HR Master Data > Maintain (PA30)







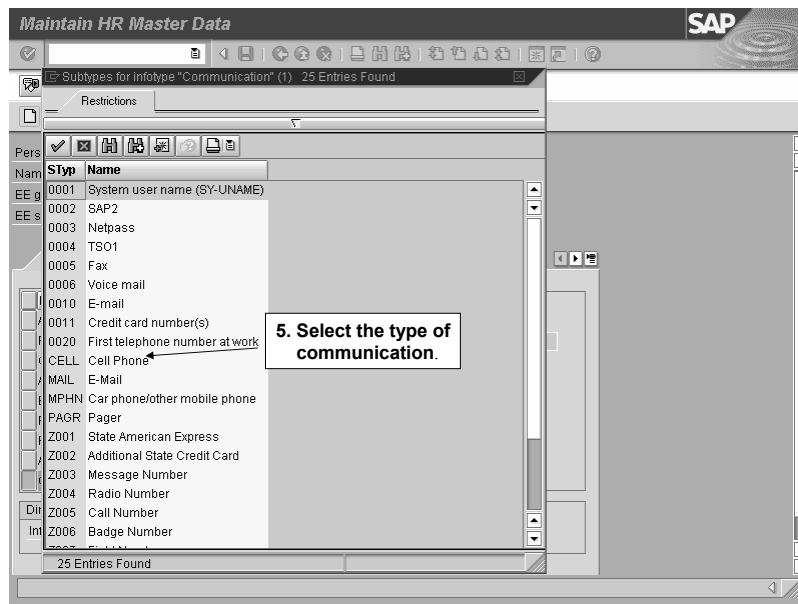
The screenshot shows the SAP 'Maintain HR Master Data' interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Maintain HR Master Data' and contains several input fields and tabs.

**Annotations:**

- 2. Enter personnel number.** Points to the 'Personnel no.' field, which contains the value '1498'.
- 4. Click on the create icon.** Points to the 'create' icon (a document with a plus sign) in the toolbar.
- 3. From the personal data tab select the Communication infotype or enter the infotype number 0105 in the infotype field under Direct selection.** Points to the 'Communication' infotype in the 'Direct selection' list.

**Form Fields and Tabs:**

- Personnel no.:** 1498
- Area:** FA01 DFA
- EE subgroup:** U0 Hourly
- Cost Center:** 383260 DFA
- Tabs:** Personal Data, Addtl. Employee Data, Employment Issues, Career Manage...
- Infotype List (Left):** Infotype text, Actions, Personal Data, Organizational Assignment, Addresses, Basic Pay, Family Member/Dependents, Residence Status, Additional Personal Data, Communication.
- Period Selection (Right):** Period, Fr., To, Today, All, From curr. date, To current date, Curr. period, Choose, Curr. week, Current month, Last week, Last month, Current Year.





SAP

Infotype Edit Goto Extras System Help

**Create Communication**

8. enter

9. save

Personnel No	1498	Name	Turner	Status	Active
EE group	7	State Extra/Seaso	Personnel ar	FA01	DFA
EE subgroup	U0	Hourly	SSN	432-54-1441	
Start	112004	to	12/31/9999		

Communication

Type CELL Cell Phone

ID/number 8164869

6. Enter the effective date.  
Refer to note below.

7. Enter the identification number  
for the communication type.



HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. |1498  
Name Turner, Quartez  
EE group 7 State Extra/Sea... Pers.area FA01 DFA  
EE subgroup U0 Hourly Cost Center 383260 DFA

Personal Data Addtl. Employee Data Employment Issues Career Manage...

Infotype text E...  
Actions ☒  
Personal Data ☒  
Organizational Assignment ☒  
Addresses ☒  
Basic Pay ☒  
Family Member/Dependents ☒  
Residence Status ☒  
Additional Personal Data ☒  
Communication ☒

Period  
Fr. To  
☐ Today ☐ Curr.week  
☐ All ☐ Current month  
☐ From curr.date ☐ Last week  
☐ To current date ☐ Last month  
☐ Curr.period ☐ Current Year  
Choose

Direct selection  
Infotype Communication STy CELL Cell Phone

☒ Record created

**You will receive a message stating: Record created.**

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## Exercise Scenario #4

An employee has been provided an agency cell phone. Maintain the employee's communication data by creating the new communication type.



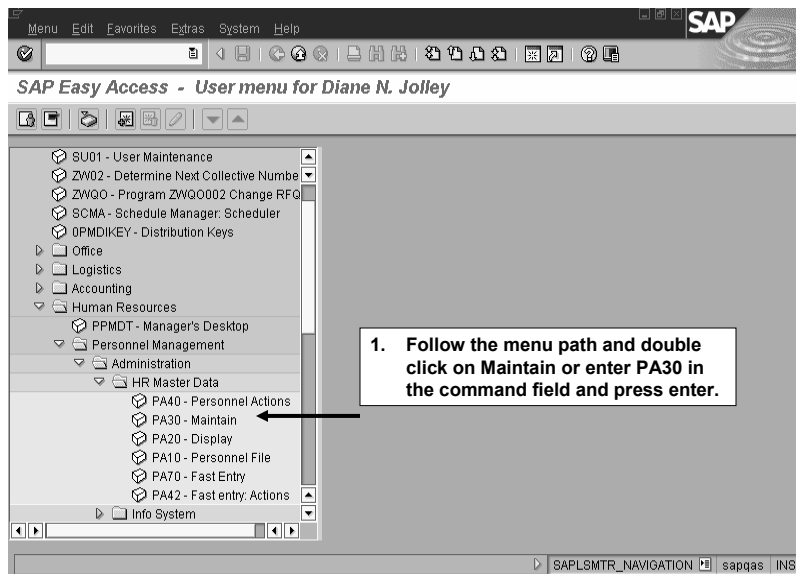


# Demonstration

## Maintain Organizational Assignment

Human Resources > Personnel Management >  
Administration > HR Master Data> Maintain (PA30)







HR master data Edit Go to Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 1498  
Name Turner, Quartez  
EE group 1 Regular State Pers. area F401 DFA  
EE subgroup UE Employee Cost Center 383260

Personal Data Addtl. Employee Data Employment Issues Career Manage

Infotype text E  
Actions  
Personal Data  
Organizational Assignment  
Addresses  
Basic Pay  
Family Member/Dependents  
Residence Status  
Additional Personal Data  
Communication

Period  
Fr. 09/21/2004 To 12/31/9999  
Today Curr. week  
A11 Current month  
From curr. date Last week  
To current date Last month

Direct selection  
Infotype Actions

4. Click on the copy icon.

2. Enter personnel number.

3. Select the Organizational Assignment infotype or enter the infotype number 0001 in the infotype field under Direct selection.



Infotype Edit Goto Extras System Help

**Copy Organizational Assignment**

Org Structure

Personnel No	2432	Name	Quatez	Status	Active
EE group	7	State Extra/Seaso..	Personnel ar	FA01	DFA
EE subgroup	00	Hourly	SSN	462-22-5856	
Start	09/29/2004	End	12/31/9999		

Enterprise structure

CoCode	ARK	State of Arkansas	Leg person	
Pers area	FA01	DFA	Subarea	0AL2
Cost Ctr	383260	DFA	Bus. Area	0610

DEPT OF FINANCE AND ...

Personnel structure

EE group	7	State Extra/Seasonal	Payr.area	11	Arkansas Bi-Weekly
EE subgroup	00	Hourly	Contract	1000 Hours/Year	

Organizational plan

Percentage	100.00	
Position	22678413	V006
Job key	21667977	9999
Exempt	N	
Org. Unit	21705318	DIR
		Directors Office

Administrator

PersAdmin	117	Constance L Staggers
Time	113	Cherry Lewis
PayAdmin	123	Lin R Hill

Additional fields

Benefits Administrator	125	Priscilla Gates
------------------------	-----	-----------------

ETR (1) (515) sapetr OVR

5. Change the Start date to the required effective date. Refer to note below.

6. Make changes as needed.

7. Make changes as needed.

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**NOTE:** If the effective date for the Organizational Assignment infotype will extend beyond the first day of the first pay period of the current fiscal year, the agency must send a request with justification to the State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



InfoType Edit Goto Extras System Help

**Copy Organizational Assignment**

Org Structure

Personnel No	Name	Quate2	Status	Active
EE group		Personnel ar	FA	
EE subgroup	00 Hourly	SSN	46	
Start	09/20/2004	to	12/31/9999	

Enterprise structure

CoCode	ARK	State of Arkansas	Leg.person	
Pers.area	FA01	DFA	Subarea	0AL2 OT,Std,HB
Cost Ctr	383260	DFA	Bus.Area	9610 DEPT OF FINANCE AND ...

Personnel structure

EE group	7	State Extra/Seasonal	Payr.area	11 Arkansas Bi-Weekly
EE subgroup	00	Hourly	Contract	1000 Hours/Year

Organizational plan

Percentage	100.00			
Position	22078413	V006		
		BUYER II		
Job key	21667977	9999		
		EXTRA HELP		
Exempt	N			
Org. Unit	21705318	DIR		
		Directors Office		

Administrator

PersAdmin	117	Constance L Staggers
Time	113	Sherry Lewis
PayAdmin	123	Linda R Hill

Additional fields

Benefits Administrator	125	Phylicia
------------------------	-----	----------

**Note: Click enter until you receive the message stating: Save your entries. Then go to step 9.**

ETR (1) (515) sapetr OVR

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HR master data Edit Copy Editg Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 8499

Name Turner, Quarte

EE group 1 Regular State Pers. area FA01 DFA

EE subgroup UE Employee Cost Center 383268 DFA

Personal Data Addl. Employee Data Employment Issues Career Manage...

Infotype list E

Actions	<input checked="" type="checkbox"/>
Personal Data	<input checked="" type="checkbox"/>
Organizational Assignment	<input checked="" type="checkbox"/>
Addresses	<input checked="" type="checkbox"/>
Basic Pay	<input checked="" type="checkbox"/>
Family Member/Dependents	<input checked="" type="checkbox"/>
Residence Status	<input checked="" type="checkbox"/>
Additional Personal Data	<input checked="" type="checkbox"/>
Communication	<input checked="" type="checkbox"/>

Period

Period Fr. 09/21/2004 To 12/31/9999

☐ Today ☐ Curr week

☐ A11 ☐ Current month

☐ From curr. date ☐ Last week

☐ To current date ☐ Last month

☐ Curr period ☐ Current Year

Choose

Direct selection

Infotype Organizational Assignment Sty S

Record created

You will receive a message stating:  
Record created.



## Exercise Scenario #5

Some of your Agency's  
Administrator's have been  
assigned too many employee's .  
Use the copy mode to change the  
Personnel, Time and Payroll  
Administrators for one of your  
employees.





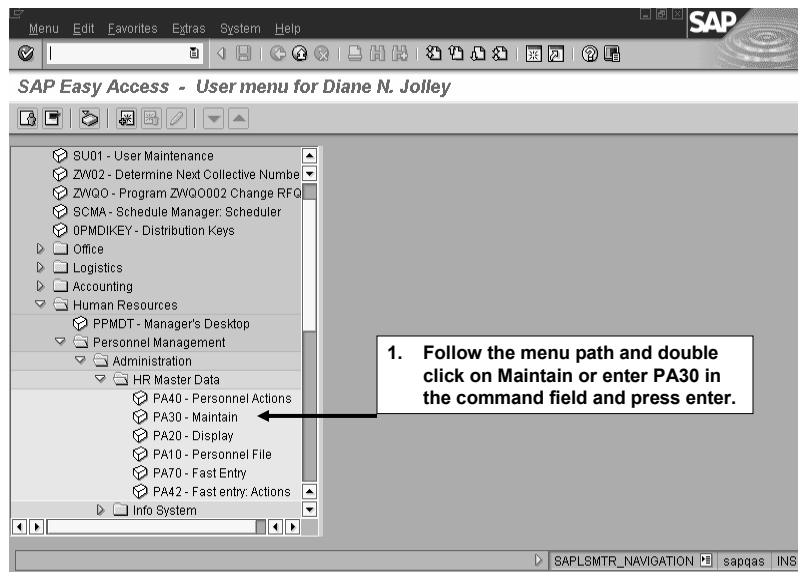


# Demonstration

## Maintain Withholding W4/ W5

Human Resources > Personnel Management >  
Administration > HR Master Data> Maintain (PA30)







HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Master Data**

4. Click on the copy icon.

2. Enter personnel number.

Personnel no. \_\_\_\_\_

Career Management Benefits Payroll Taxes Garnishments

Residence Tax Area  
Work Tax Area  
Unemployment State  
Withholding Info W4/W5 US  
Add. Withh. Info. US  
IRS Limits USA  
Other Taxes US

Period  
All From curr.date To current date Curr.period  
Current month Last week Last month Current year

3. Select the Withholding Info W4/W5 Infotype or enter the infotype number 0210 in the infotype field under Direct selection.

Choose

Direct selection  
Infotype \_\_\_\_\_ Sty \_\_\_\_\_

SAPMP50A sapqas INS



Personnel no. 1499  
Name Turner, Quartez  
EE group 10 Subtypes for infotype 'Withholding Info W4W5 US' (1, 100 Entries Found)  
EE subgroup Restrictions

Career Map

Auth	Description	Tax Lo
AL	Alabama	B
AR	Arkansas	B
AR01	Texarkana, Arkansas	D
AS	American Samoa	B
AZ	Arizona	B
CA	California	B
CT	Connecticut	B
DC	District Of Columbia	B
DE	Delaware	B
FED	Federal	A
GA	Georgia	B
GU	Guam	B
HI	Hawaii	B
IA	Iowa	B
ID	Idaho	B
IL	Illinois	B
IN	Indiana	B
IN2C	Gibson	C
IN2D	Knox	C

100 Entries Found

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**Withholding Info W4/W5 US (Infotype 0210)** - This infotype stores the information presented by the employee on the W4/W5. This information is used by payroll to calculate withholding tax. The screen will appear twice. Enter State withholding information. Then enter Federal withholding information.

Dependent allowance field must reflect the number of dependents the employee is claiming on the withholding form. If the employee desires to withhold additional amounts from their pay, enter the dollar amount in the 'Add. Withholding' field.



The screenshot shows the SAP 'Copy Withholding Info W4/W5 US' form. It contains fields for Personnel No. (1490), Name (Turner), Status (Active), EE group (7), State Extra/Seaso. (FAB1), DFA, EE subgroup (00), Hourly (SSN), 432-54-1441, Start (09/20/2004), and a Social Security Number (12-34-5678). Below these are fields for Status, Tax authority (AR, Arkansas), Tax level (B, State), Filing Status (00, Head of household or family), and Exemptions (Allowances: 3, Additional allowance, Personal allowance, Dependent allowance, Tax exempt indicator). There are also fields for Withholding adjustments (Additional withholding, Default formula: WITHHOLDING FOR, Alternate formula) and Earned Income Credit filing status (EIC status). At the bottom is a table for Overrides (from infotype 234) with columns: From date, End Date, Supplemental met., Tax override, and Certificat.

6. Change the From date to an effective date after the last received warrant date. Refer to note below.

7. Make required updates according to the employee's W4/W5 form.

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Note: Changes to the employee's taxes should be made effective after the last receive warrant date. For example, for pay period 16, the receive warrant date is August 6, 2004. Therefore, the effective date for changes to an employees taxes must be after August 9, 2004.

If the effective date for the Withholding Info W4/W5 US infotype will extend beyond the beginning of the first pay period of the fiscal year the agency must send a request with justification to the State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



8. Click Enter.

9. Click Save.

You will receive a message stating: Record valid from date to date delimited at end.

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## **Withholding Info W4/W5 US (Infotype 0210), continued –**

There are only two groups of employees eligible for exemption from Arkansas income tax (Arkansas Acts 48 and 177 of 1977). The first group is as follows:

1. Employees living within the city limits of Texarkana, AR – These employees do not have to work in Texarkana, AR or Texarkana, TX. In fact, there are no limitations as to where they work to be exempt from Arkansas income tax. However, employees working within the city limits of Texarkana, AR; but do not live within the city limits of Texarkana, AR are not exempt from Arkansas income Tax. For example, the employee lives in Hope, AR and works within the city limits of Texarkana, AR is not exempt from Arkansas income tax.



Personnel No. 1498 Name Turner Status Active  
EE group 7 State Extra/Seaso Personnel ar FA01 DFA  
EE subgroup 08 Hourly SSN 432-54-1441  
Start 09/21/2004 End 12/31/9999

Status  
Tax authority AR Arkansas Tax level State  
Filing Status 06 Head of household or family

Exemptions  
Allowances 3 Exemption amount  
Additional allowance Additional exemption amount USD  
Personal allowance  
Dependent allowance  
Tax exempt indicator ☐ IRS mandates

Withholding adjustments  
Additional withholding USD  
Default formula 1 WITHHOLDING FOR Alternate formula

Earned Income Credit filing status  
EIC status

Overrides (from infotype 234)  
From date End Date Supplemental mat. Tax override Certificat

Record valid from 09/20/2004 to 12/31/9999 delimited at end

AASIS Support Center, V3.0  
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## Withholding Info W4/W5 US (Infotype 0210), continued –

There are only two groups of employees eligible for exemption from Arkansas income tax (Arkansas Acts 48 and 177 of 1977). The second group is as follows:

### 2. Employees living within the city limits of Texarkana, TX –

These employees **MUST** work within the city limits of Texarkana, AR to be exempt from Arkansas income tax. They are not exempt from Arkansas income tax if they work anywhere else in Arkansas. For example, an employee that lives in Texarkana, TX but works in Magnolia, AR is not exempt from Arkansas income tax.

**If the employee is exempt, only use “R” in the Tax exempt indicator field.** Contact OPM-State Payroll Systems, if you have any questions concerning this infotype.



The screenshot shows the SAP 'Maintain HR Master Data' interface. The top menu bar includes 'HR master data', 'Edit', 'Info', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar says 'SAP'. The main window displays employee data for 'Turner, Quartez' (Personnel no. 1498). The 'EE group' is '1 Regular State' and 'Pers. area' is 'FA01 DFA'. The 'EE subgroup' is 'UE Employee' and 'Cost Center' is '383260 DFA'. The 'Career Management' tab is active, showing a list of infotypes on the left and a 'Period' selection area on the right. The 'Withholding Info W4/W5 US' infotype is selected. Below the list, the 'Direct selection' section shows 'Infotype: Withholding Info W4/W5 US' and 'Sty:'. A message box at the bottom states: 'You will receive a message stating: Record created.'

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**Note:** After updating the Withholding Info W4/W5 for Arkansas, you may need to update the Withholding Info W4/W5 for Federal. If so, repeat steps 2 thru 9. However, on step 3 enter the infotype number 0210 in the infotype field and select 'Federal' from the drop-down list for subtype (Sty).





## Exercise Scenario #6

You receive a new W4/ W5 for an existing employee. Maintain the employee's withholding information using the copy mode.



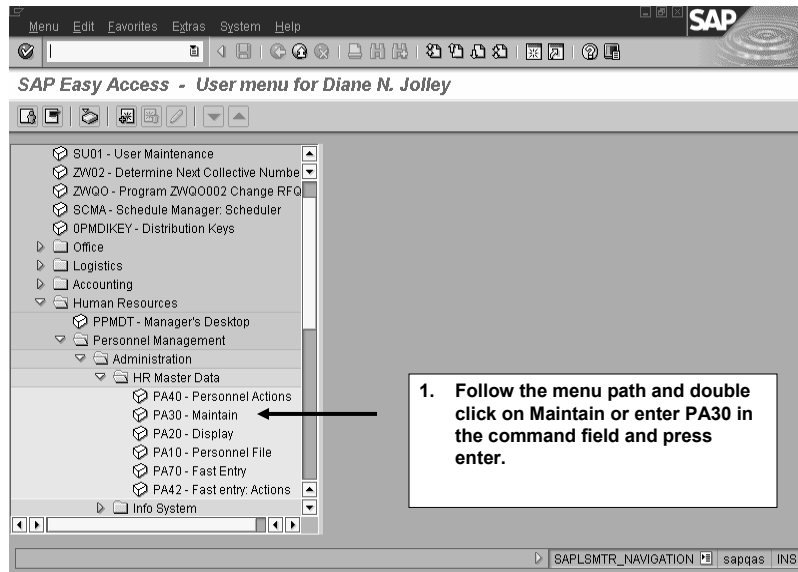


# Demonstration

## Maintain Date Specifications

Human Resources > Personnel Management >  
Administration > HR Master Data > Maintain (PA30)







The screenshot shows the SAP HR Master Data maintenance interface. The title bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The main title is 'Maintain HR Master Data'. Below this, there are tabs for 'Personal Data', 'Addtl. Employee Data', 'Employment Issues', and 'Career Manage...'. The 'Personal Data' tab is active. The screen displays various fields for employee information, including 'Personnel no.' (2433), 'Name' (Turner, Quartez), 'EE group' (7), 'State Extra/Sea' (FA01), 'DFA' (DFA), 'EE subgroup' (U0), 'Hourly' (Hourly), 'Cost Center' (303200), and 'DFA' (DFA). A callout box labeled '2. Enter Personnel number.' points to the 'Personnel no.' field. Another callout box labeled '3. Select the Date Specifications infotype or enter the infotype number 0041 in the infotype field under Direct selection.' points to the 'Infotype' field in the 'Direct selection' section. A third callout box labeled '4. Click on the Change icon.' points to the 'Change' icon in the top toolbar. The 'Direct selection' section includes fields for 'Infotype' (Date Specifications), 'STy' (STy), and 'Period' (Fr. To). The 'Date Specifications' infotype is selected. The 'Period' section includes 'Fr.' and 'To' fields. The 'Direct selection' section also includes a 'Choose' button. The bottom status bar shows 'ETR (1) (510)' and 'sapetr | INS'.

4. Click on the Change icon.

2. Enter Personnel number.

3. Select the Date Specifications infotype or enter the infotype number 0041 in the infotype field under Direct selection.



**5. Enter the effective date. Referto note below.**

**6. Enter the correct date.**

**7. Click Enter.**

**8. Click Save.**

**IF YOU REMOVE A DATE YOU MUST ALSO REMOVE THE DATE TYPE.**

Date type	Date	Date type	Date
Z1 Original Hire Date	09/20/2004	Z2 Career Service Date	09/20/2004
Z3 Latest Hire Date	09/20/2004	Z4 Leave Accrual Date	09/20/2004

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**Note:** The effective date must not be earlier than the beginning of the first pay period of the fiscal year. For example, a date specifications infotype updated on 7/6/04 may have an effective date no earlier than 6/20/04.

If the effective date for the date specifications infotype will extend beyond the beginning of the first pay period of the fiscal year, the agency must send a request with justification to the State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval. Or the agency personnel with the role of Time Management Specialist may need to correct the employee's leave balance if necessary.



## Exercise Scenario #7

You receive a request from an employee stating that their leave balance is not correct. After viewing the Date Specifications infotype, an incorrect date is reflected for 'Leave Accrual Date'. Maintain the employee's Date Specifications by using the change mode.



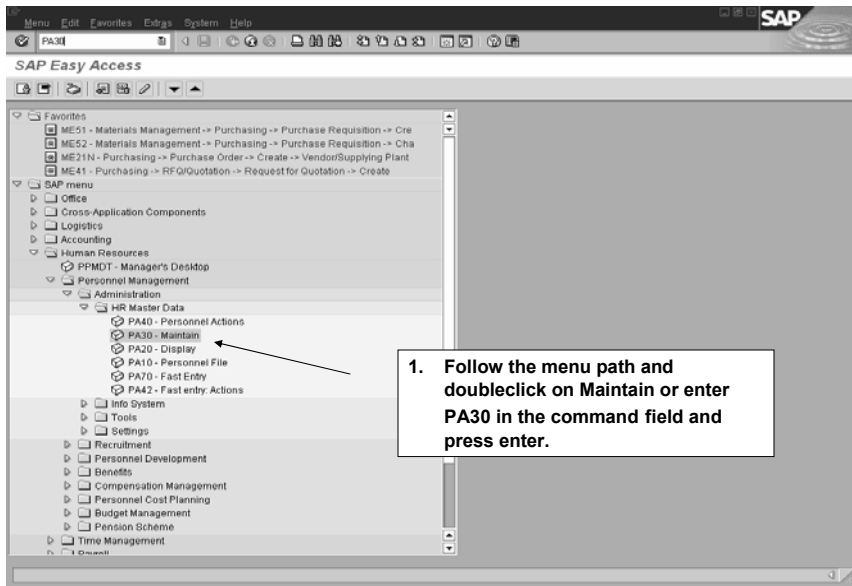


# Demonstration

## Maintain Communication – Delimit Communication Type

Human Resources > Personnel Management >  
Administration > HR Master Data > Maintain (PA30)









4. Click on the Delimit icon.

2. Enter personnel number.

3. Select the Communication infotype or enter the infotype number 0105 in the infotype field under Direct selection.



The screenshot shows the SAP 'Maintain HR Master Data' interface. At the top, the menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar says 'SAP'. The main window has a toolbar with icons for saving, deleting, and other functions. The data entry area shows 'Personnel no.' 1498, 'Name' Turner, Quartez, 'Pers area' FA81 DFA, and 'Cost Center' 300000. The 'Delimit Date' is set to 10/22/2004. A callout box with an arrow pointing to the date field contains the text '5. Enter the date to end the record.' Below the data entry area, there are tabs for 'Data', 'Employment Issues', and 'Career Manage'. The 'Data' tab is active, showing a list of data categories on the left: 'Infotype text', 'Actions', 'Personal Data', 'Organizational Assignment', 'Addresses', 'Basic Pay', 'Family Member/Dependents', 'Residence', 'Additional', and 'Communication'. The 'Communication' category is selected. A callout box with an arrow pointing to the 'Communication' category contains the text '6. Click Transfer.' To the right of the list, there is a 'Period' section with radio buttons for 'Period', 'Today', 'All', 'From curr date', 'To curr date', 'Curr period', 'Curr week', 'Current month', 'Last week', 'Last month', and 'Current Year'. There are also 'Fr.' and 'To' date fields and a 'Choose' button. At the bottom, there is a 'Direct selection' section with 'Infotype' set to 'Communication' and 'STy' set to 'STy'.



HR master data Edit Copy Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 1499  
Name Turner, Quarteiz  
EE group 1 Regular State Pers area FA01 DFA  
EE subgroup UE Employee Cost Center 382260 DFA

Personal Data Addtl. Employee Data Employment Issues Career Manage...

Infotype text E Period  
Actions ☒ ☐  
Personal Data ☒  
Organizational Assignment ☒  
Addresses ☒  
Basic Pay ☒  
Family Information  
Resider  
Addition  
Comments  
Direct select  
Infotype

End date set to 12/31/9999

7. Click continue.

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[illegible]

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10. Click on the Maintain overview icon.

You will receive a message stating:  
Records delimited.

The screenshot shows the SAP 'List Communication' screen. At the top, there's a menu bar with options like 'InfoPne', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu, there's a toolbar with various icons. The main area is titled 'List Communication' and contains a form with fields for 'Personnel No.' (1498), 'Name' (Turner), 'Status' (Active), 'EE group' (1), 'Regular State Em.' (FA01), 'DFA', 'EE subgroup' (UE), 'Employee' (SSN), '432-54-1441', and 'Choose' (01/01/1800 To 12/31/9999). Below the form is a table with columns 'Start date', 'End Date', 'Co.. Name', and 'IDnumber'. The first three rows of the table are populated with data: '11/20/2004', '12/30/9999', 'CELLCell Phone', and '0164069'. A callout box with an arrow points to the 'End Date' field in the first row, stating: 'The end date for the cell phone will be reflected.'

Start date	End Date	Co.. Name	IDnumber
11/20/2004	12/30/9999	CELLCell Phone	0164069
11/20/2004	12/30/9999	CELLCell Phone	0164069
11/20/2004	12/30/9999	CELLCell Phone	0164069



## Exercise Scenario #8

An employee has returned the agency's cell phone. Maintain the employee's communication data by delimiting the communication type for the cell phone.

